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Robert Kieckhefer

(FORM UPDATED: 08/11/2010)

WISCONSIN STATE LEGISLATURE ... PUBLIC HEARING - COMMITTEE RECORDS

2011-12

(session year)

Senate

(Assembly, Senate or Joint)

Committee on Agriculture, Forestry, and Higher Education...

COMMITTEE NOTICES ...

- Committee Reports ... CR
- Executive Sessions ... ES
- Public Hearings ... PH

INFORMATION COLLECTED BY COMMITTEE FOR AND AGAINST PROPOSAL

- Appointments ... Appt (w/Record of Comm. Proceedings)
- ► Clearinghouse Rules ... CRule (w/Record of Comm. Proceedings)
- Hearing Records ... bills and resolutions (w/Record of Comm. Proceedings)

(ab = Assembly Bill) (sb = Senate Bill) (ar = Assembly Resolution)

(sr = Senate Resolution)

(ajr = Assembly Joint Resolution) (sir = Senate Joint Resolution)

Miscellaneous ... Misc

PDF - Record of Committee Proceedings for Executive Appointment Kieckhefer, Robert from 01-20-2012

Senate

Record of Committee Proceedings

Committee on Agriculture, Forestry, and Higher Education

Kieckhefer, Robert, of Mequon, as a member of the College Savings Program Board, to serve for the term ending May 1, 2015.

April 06, 2011

Referred to Committee on Agriculture, Forestry, and Higher Education.

January 19, 2012

PUBLIC HEARING HELD

Present:

(7) Senators Schultz, Harsdorf, Kedzie, Moulton, Hansen,

Shilling and King.

Absent:

(0) None.

Excused:

(0) None.

Appearances For

• Robert Kieckhefer, Mequon

Appearances Against

None.

Appearances for Information Only

• None.

Registrations For

Eric Esser, Madison — Appointments Director, Office of Governor Walker

Registrations Against

• None.

Registrations for Information Only

None.

January 19, 2012 **EXECUTIVE SESSION HELD**

Present: (7) Senators Schultz, Harsdorf, Kedzie, Moulton, Hansen,

Shilling and King.

Absent: (0) None.

Excused: (0) None.

Moved by Senator Harsdorf, seconded by Senator Shilling that **Kieckhefer**, **Robert** be recommended for confirmation.

Ayes: (7) Senators Schultz, Harsdorf, Kedzie, Moulton,

Hansen, Shilling and King.

Noes: (0) None.

CONFIRMATION RECOMMENDED, Ayes 7, Noes 0

Sanchit Mulmuley Committee Clerk

Vote Record Committee on Agriculture, Forestry, and Higher Education

Date: 1/19		Т	0	61 - N	۸	
Moved by: Sea	n · Mangalo	Seconded	oy: Sen.	Shi 11	ing.	
AB	SB_		Clearingho	use Rul	e	
AJR			Appointme	nt Rol	pert Kiec	kheler
AR						<u> </u>
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A/S Sub Amdt _						
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Be recommended Passage Introduction	☐ Adoption	Confirmation ☐ Tabling	□ Concurrenc	_	☐ Indefinite Pe	ostponement
Committee M	<u>ember</u>		<u>Aye</u>	<u>No</u>	<u>Absent</u>	Not Voting
Senator Dale	Schultz, Ch	air				
Senator Shei	ila Harsdorf					
Senator Neal	Kedzie					
Senator Terr	y Moulton					
Senator Dave	e Hansen					
Senator Jenr	nifer Shilling					
Senator Jess	sica King					
		Total	s: <u>7</u>	0	0	0

Q	Motion Carried



WISCONSIN STATE LEGISLATURE





SCOTT WALKER OFFICE OF THE GOVERNOR STATE OF WISCONSIN

P.O. Box 7863 Madison, WI 53707

April 1, 2011

To the Honorable, the Senate:

I am pleased to nominate and with the advice and consent of the Senate, do appoint Mr. Robert Kieckhefer to be a Public Member on the College Savings Program Board to serve a term expiring on May 1, 2015.

Mr. Kieckhefer will be available to the Senate for hearings and my staff will assist in any way they can.

Respectfully submitted,

Scott Walker Governor



SCOTT WALKER OFFICE OF THE GOVERNOR STATE OF WISCONSIN

P.O. Box 7863 Madison, WI 53707

April 1, 2011

Mr. Robert Kieckhefer 1903 West Hidden Reserve Court Mequon, WI 53092-5565

Dear Mr. Kieckhefer:

I am pleased to appoint you to the College Savings Program Board, effective April 4, 2011. Your experience, knowledge, and dedication will be a true asset to my administration and a great benefit to the people of Wisconsin.

I look forward to working with you to find innovative ways of delivering services and implementing positive change for the citizens of our state.

Sincerely,

Scott Walker Governor Robert A. Kieckhefer First Vice President RBC Wealth Management 1000 N. Water Street Suite #1500 Milwaukee, WI 53202

Home: 1903 W. Hidden Reserve Ct. Mequon, WI 53092

414-347-7038 Cell # 414-852-9595 rob.kieckhefer@rbcdain.com

After working for 25 years as an engineer and contractor for Air Products and Chemical and Price Erecting, I retired from the construction industry in 1998 in order to fulfill a lifelong dream of working in the financial service industry and building a retirement planning team. I formed the Kieckhefer Group in 1999 while at Wachovia Securities and moved my team over to RBC Wealth Management in 2002. Our team has grown to six members who are all licensed to advise and help individuals reach their retirement goals. I have been selected as a member of Fidelity Investments' Retirement Leadership Council, American Funds' All American Team, RBC Wealth Management's Registered Investment Advisor, and Plan Sponsor Magazines Retirement Advisory Team of the year in 2007 and 2009.

After ten years, we have enrolled thousands of participants into state of the art retirement plans from very small SEP plans to 401(k) plans with over 6000 participants. Our plans are "open architecture" featuring "best of class" funds with customized portfolios and quarterly rebalancing. Using state of the art technology to monitor fund selection and performance and innovative techniques to help plan sponsors address key issues such as fiduciary liability, education, asset allocation and needs analysis, we are quickly being recognized and referred as an industry leader.

Qualifications:

BS and BA in Chemical Engineering and English Literature, University of Pennsylvania MS in Environmental Engineering, University of Wisconsin, Madison Dean's List, Hexagon Engineering Honor Society, National Science Foundation Scholar, EPA Trainee, Assistant Teaching Fellowship

Series 7, 63, 65 and life and health insurance licenses

Married with 3 children. I am a lifelong resident of Milwaukee. Former Chairman of the St. Monica's Church Building and Grounds Committee, Founder and former President of the Wisconsin Waterfowl Association, Founder and former President of the Wisconsin Dove Hunters' Association. Formerly involved with the Milwaukee Inner City Employment Initiative and LaBrew Troopers, a military school for inner city youths.

I am presently involved with the Milwaukee Rotary, the Manitoba grade school and a number of charities in Milwaukee. Former Board Member of: Construction Engineering, Pope Scientific and presently board member and owner of Ridgway LLC.



SCOTT WALKER OFFICE OF THE GOVERNOR STATE OF WISCONSIN

P.O. Box 7863 Madison, WI 53707

GOVERNOR'S APPOINTMENT

NAME:

Robert Kieckhefer

MAILING ADDRESS:

1903 West Hidden Reserve Court

Mequon, WI 53092

E-MAIL ADDRESS:

rob.kieckhefer@rbcdain.com

RESIDES IN:

Mequon, WI

TELEPHONE:

(262) 242-6862 (h)

(414) 347-7038 (w)

OCCUPATION:

1st Vice President

RBC Wealth Management

APPOINTED TO:

College Savings Program Board

Public Member

TERM:

A term to expire May 1, 2015

SUCCEEDS:

Jeff Plale

SENATE CONFIRMATION:

Required

DATE OF APPOINTMENT:

April 4, 2011

DATE OF NOMINATION:

April 4, 2011

State of Wisconsin\Government Accountability Board

Ethics & Accountability Division P.O. Box 7984 212 E. Washington Ave, 3rd Floor Madison, W1 53707-7984 Phone (608) 266-8005 Fax (608) 264-9319 E-mail: GABEthics@wi.gov



KEVIN J. KENNEDY Director and General Counsel

4/22/2011

Senate Committee Members:

The attached Statement of Economic Interests is provided with regard to the individual's nomination to a State Public Office by Governor Scott Walker.

Sincerely, STATE OF WISCONSIN GOVERNMENT ACCOUNTABILITY BOARD

Nominee:

Kieckhefer, Robert

Nomination Date:

4/4/2011

Mail or fax to: Wisconsin Government Accountability Board, P.O. Box 7984, Madison, WI 53707-7984; Fax: (608) 264-9319

Statement of Economic Interests

Filed in 2011 for calendar year 2010

Name:

KIECKHEFER

State position:

ROBERT 411 APR 22 PM 2:41

GOVERNMENT

COLLEGE SAVINGS PLAN

Strict if applicable)

(held or sought)

(include agency, division, branch or district, if applicable)

FOR EXPLANATIONS, EXAMPLES AND EXCEPTIONS SEE THE INSTRUCTIONS OR VISIT OUR WEBSITE AT http://iqab.wi.gov. Still have questions? For priority service send an e-mail to: GABEthics@wisconsin.gov; otherwise leave a detailed message at (608) 261-2028. **Attach additional pages as needed/Please See Instructions.**

Information current as of

1. INVESTMENTS.

a) Funds Available in Wisconsin Deferred Compensation Program. These funds are available to participants in the Wisconsin Deferred Compensation program and many of them are also available for direct purchase, independent of that program. If you held an investment of \$5,000 or more in any of these funds - either directly or through the program -- please check the appropriate box.

	# / #	one		"/"	one	200		·/- (
	\$5,000 to \$50,0000	More than \$50,000		\$5,000 to \$50,0000	More than \$50,000			\$5,000 to \$50,000	More than \$50,000
Profile Series		8	Small Cap			VOICE FEERN	Bond		
Vanguard Retirement 2045	8		BlackRock Russell 2000 Index				BlackRock US Debt Index		
Vanguard Retirement 2035			DFA US Micro Cap				Federated US Government Securities 2-5 Yr.		
Vanguard Retirement 2025		2	Mid Cap BlackRock Mid Cap Equity Index				Vanguard Long- Term Investment Grade Adm		
Vanguard Retirement 2015			T. Rowe Price Mid Cap Growth				Money Market Vanguard Admiral Treasury Money Market		
Vanguard Target Retirement Income			Large Cap			ALC:	Fixed Returns for the Quarter		
Kethement moome		200	Calvert Social Investment Equity				Stable Value Fund		,
International American Funds EuroPacific R5			Fidelity Contrafund				FDIC Bank Option		
BlackRock EAFE Equity Index			Vanguard Institutional Index Fund Plus						
			Vanguard Wellington – Admiral Shares			5 5000			

b) Other Investments. List stocks, bonds, limited partnerships, Wisconsin governmental securities, and mutual and money nily's interest was valued at \$5 000 or more

market funds in which you and your family's interest	Ty	pe of sec	urity - "√"	one		Arnount -	'√" one
Name of security	Stock/ option/ futures	Bond	Limited partnership	Wisconsin governmental security	Mutual or money market fund	\$5,000 to \$50,000	More than \$50,000
REFER TO ATTACHED							
LIST OF SECURITIES			<u> </u>				
BY ACCOUNT FOR							
ROBERT AND MANYGler KIRCHHEFER)						
KIECKHEFER							

a) Enterprise(s) operating under	er a business or tra	ade name, lis	t here.				
		Municipality				Name and the second second second		
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12104WA	<u> </u>	MITTOMA	ce Mid Da	as WF		THE TRUE OF		7 7070
			······································					9
h) Enterprise(s	s) NOT operating	ı under a business	or trade nar	ne. list her	re.			
<u> </u>		Municipality						
Street address or f	ire number	or Town	County	State		Describe nature of busi	ness	

		1						
s. COMMERCIAL (CUSTOMERS, CI	LIENTS, AND TEN	ANTS. For e	ach unincor	porated b	ousiness, subchapter	S corp	oration
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5. NON-COMMERCIAL REAL ESTATE. List the specific location of WISCONSIN REAL ESTATE in which you or your family had an interest (except your principal residence and real estate whose location you listed in item 2).

LOCAT	TION OF PROPERTY		NATURE OF INTEREST
	Municipality		(own, lease, option,
Street address or fire number	Or Town	County	easement, land contract)
		,	

6. OFFICERS AND DIRECTORS. List organizations of which you or a family member was an officer or director (unless listed in Item #2.)

Business or organization	City	State	Position

Business or organization				Clty	State
NONE					
					<u> </u>
	6	4 65 000 ar more			
CREDITORS. List creditors to which y	ou or your family owed	1 \$5,000 or more.		",	/" one
		Į			More than
				\$50,000	\$50,000
Creditor		City	State	or less	ļ
NONE					
					1
		<u> </u>			<u> </u>
					0040
Part B			Ford	calendar ye	ar zuju
EMPLOYERS. List your and your fam	nily's EMPLOYERS (\$1	,000 or more of in	ncome) in 2010.		
Name of employer	1			anloware hysinana	
If State of Wisconsin, identify agency or institut	tion) City	State	Nature of em	nployer's business	
RBC WEALTH MANAGENE	NI MilwAUKE	WE -	MAPCIAL	J L/LU/CE	
		<u> </u>			
Source of income				City	State
1. ENTERTAINMENT AND GIFTS.	List individuals and or	ganizations that p	provided you with e	entertainment or g	ifts (more th
\$50) in 2010.					
			1	City	State
ALOKIE	<u> </u>			City	
MONE.				City	
NONE				City	
NONE	previously reported to	the Government	and payment of ex	xpenses related to	State
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AGENT, REPRESENTATIVE OR SPOKESPERSON. List each organization that authorized you or a family member to

The information sought in this form is required by §§19.43 and 19.44, Wisconsin Statutes. Failure to file a completed form may result in a forfeiture of up to \$500. Statements of Economic Interests are open for public inspection. The Government Accountability Board will notify you of the identity of any person who examines your Statement. In accordance with §15.04(1)(m), Wisconsin Statutes, the Government Accountability Board states that no personally identifiable information is likely to be used for purposes other than those for which it is collected.



4/9/2011 12:34:19

Account Workbook

Page: 1

Positions

303-61030	IO	Aggr Growth	Pending Bal	91,727.37	Total Acct Val	575,474
46R	CSI	03 07 2	Margin Bal		Portfolio Val	575,474
ROBERT A KIECKHEFER SEGREGATED ROLLOVER IRA RBC CAPITAL MARKETS CORP CUST 1903 W HIDDEN RESERVE COURT	Sweep Home Business	TKSXX 262/242-6862 414/347-7038	MMF Balance	169,149.79	Funds Available Fed Call	169,149.79

	9 6 5	Qty	Description 100 April 100	Symbol	Maturity Date :-	Mkt Price	Mkt Value	Type
1		169,149,280000	PRIME MONEY MARKET FUND	TKSXX		1.0000000	169,149.28	1
2	T	40,000	CYBERCARE INC	T				1
3	•	500	CHESAPEAKE ENERGY CORP	CHK		34.0200000	17,010.00	1
4		1,500	DEERE & CO	DE		95.9300000	143,895.00	1
5	*	1,000	E I DU PONT DE NEMOURS & CO	DD		55.4000000	55,400.00	1
6		8,000	EXACT SCIENCES CORP	EXAS		7.0600000	56,480.00	1
7		384	ER URGENT CARE HLDGS INC	ERUC		0.0001000	0.03	1
8		1	EVERGREEN SOLAR INC	ESLR		1.3500000	1.35	1
9		1,000	MONSANTO CO	MON		66.2200000	66,220.00	1
10	-	1,000	***MCDERMOTT INTERNATIONAL INC	MDR		25.0500000	25,050.00	1
11		1,000	***SYNGENTA AG	SYT		67.1000000	67,100.00	1
12	-	3,000	UNIONTOWN ENERGY INC	UTOG		1.7900000	5,370.00	1
13		2,000	WEYERHAEUSER CO	WY		23.6100000	47,220.00	1



4/9/2011 12:33:36

Account Workbook

Page: 1

Positions

12,255 303-61028 Aggr Growth Pending Bal 963.15 Total Acct Val 03 07 2 Portfolio Val 12,255 Margin Bal CSI 46R **TKSXX** MMF Balance 963.15 Funds Available 963.15 ROBERT A KIECKHEFER Sweep **ROTH IRA** Home 262/242-6862 Fed Call RBC CAPITAL MARKETS CORP CUST **Business** 414/347-7038 1903 W HIDDEN RESERVE COURT MEQUON WI 53092-5565

1 1 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2	Qty	Description	Symbol Maturity Date	Mkt Price	Mkt Value Type
1	963,150000	PRIME MONEY MARKET FUND	TKSXX	1.0000000	963.15 1
2	60	***BARCLAYS BK PLC	INP	73.1400000	4,388.40 1
3	150	ISHARES TR FTSE CHINA 25 INDEX	FXI	46.0200000	6,903.00 1



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MEQUON WI 53092-5565

Account Workbook

Page: 1

Positions

RBC CAPITAL MARKETS CORP CUST Business 414/347-7038 1903 W HIDDEN RESERVE COURT
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- 2 m		Oty	Description	Symbol:		Mkt Value	
11+	TODAY	1,917,610000	PRIME MONEY MARKET FUND	TKSXX	1,0000000		
- 1+	TODAT	3,000	AKEENA SOLAR INC	WEST	0.4612000		
	+	3,000	AEROVIRONMENT INC	AVAV	29.1700000		
- 3		2,000	AVIS BUDGET GROUP INC	CAR	18.3700000		
		4,000	AK STEEL HOLDING CORP	AKS	15.7800000		
6		4.000	EXACT SCIENCES CORP	EXAS	7.0600000		
7	+	431.381000	"EATON VANCE GREATER INDIA	ETGIX	26.8800000		
8		3.000	FORD MOTOR CO	F	15.3300000		
9	 	193.330000	**FIDELITY ADVISOR NEW	FNIAX	20.8800000		
10	+	500	LANNETT CO INC	LCI	5,2900000		
11		600	MOSAIC CO	MOS	78,4100000		
12		1,000	MANITOWOC CO INC	MTW	21.6000000		
13		1,000	ZHONE TECHNOLOGIES INC	ZHNE	2.6300000	2,630.00	1
131	1	1,000	Ellone legalitation				



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Account Workbook

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Positions

Pending Bal 31,601.49 Total Acct Val 73,630 Ю Aggr Growth 303-61044 73,630 Portfolio Val CSI 03 07 2 Margin Bal 46R Funds Available 31,601.49 **MMF** Balance 31,601.49 MARY GLEN KIECKHEFER **TKSXX** Sweep 262/242-6862 Fed Call 1903 W HIDDEN RESERVE COURT Home 414/352-3714 MEQUON WI 53092-5565 **Business**

100 No. 100 No. 100	Oty	A CAMPAGE REPORT OF THE PARTY O	Description Symbol		Mkt Value Type
1 1	31 601 390000	PRIME MONEY MARKET FUND	TKSXX	1.0000000	31,601.39 1
2	200	AT&T INC	T T	30.7100000	6,142.00 1
3 -	200	CONAGRA FOODS INC	CAG	23,6500000	4,730.00 1
	300	GENERAL ELECTRIC CO	GE	20.1900000	6,057.00 1
5	200	JPMORGAN CHASE & CO	JPM	46.8400000	9,368.00 1
	300	SPECTRA ENERGY CORP	SE	27.1600000	8,148.00 1
 7 -	200	WASTE MANAGEMENT INC DEL	WM	37.9200000	7,584.00 1

Summary

ADIK & DEFERRED COMPRINT CAN

Account: RBC US WAP (14022)



Data as of 04/18/2011

Current Balance

\$388,545.54

Vested Balance

\$215,582.04

Investments

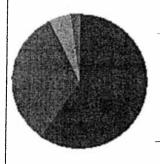
Sources

Asset Classes

Year-to-Date Change

View Class-Year and Non-Class-Year Investment Balances [7]

This view shows the investments that you hold within your plan. To view historical performance, click an investment.



Current Balance (%)	Investment	Current Balance (\$)
59.17%	RBC SHARE ACCOUNT	\$229,901.28
33.16%	TRP MID CAP GROWTH	\$128,845.45
5.42%	AF EUROPAC GROWTH R6	\$21,065.23
2.11%	AF GRTH FUND AMER R6	\$8,199.22
0.14%	3RD AV SM CAP VAL IS	\$534.36
100%		\$388,545.54

Investments by Asset Class

	Balance	Shares or Units †	NAV	Change Per Share or Unit (\$)
Stock Investments	A Self and response to the self-self-self-self-self-self-self-self-	TO THE STATE OF THE PROPERTY AND ADMINISTRATION OF STATES AND ADMINISTRATI	A THE STATE OF THE	eran erand ad nic erig er ger de mendelse er en er er er er er en erende e en erende er er en erende er en erende er en erende er
Mid-Cap				
TRP MID CAP GROWTH	\$128,845.45	2,064.831	\$62.40	-\$0.90
Small Cap	A COLOR COMMISSION OF THE PROPERTY OF THE PROP	to the term of the second distribution of the decision of the second distribution of the second distri	Cartes and an income the second secon	Andrew Statement
3RD AV SM CAP VAL IS	\$534.36	24.179	\$22.10	-\$0.25
International		ment in territori, in haddens in Alexa dibilitari dengandari yandadari yanta de sassari	antani da makat di Appert App address appearance de appearance de la companya de	
AF EUROPAC GROWTH R6	\$21,065.23	494.141	\$42.63	-\$0.78
RBC SHARE ACCOUNT	\$229,901.28	3,711.078	\$61.95	-\$0.64
AF GRTH FUND AMER R6	\$8,199.22	260.458	\$31.48	-\$0.38

Balances and prices are subject to nightly account updates.

Any account and/or balances represented here are bookkeeping entries that measure the plan sponsor's obligation to you. Neither you nor the plan hold actual balances in the funds listed in this plan.

[†]View your short term and long term shares.

Summary

Print

Account:

RBC USA RET&SAV PLAN (14006)

Data as of 04/18/2011

Current Balance Vested Balance

\$9,113.88 \$9,113.88

Important Tax Information

2010 tax forms will be mailed and posted online.

View your tax form or see when it will become available.

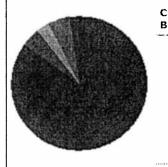
Sources

Asset Classes

Year-to-Date Change

View Cost Basis and Equivalent Shares

This view shows the investments that you hold within your plan. To view historical performance, click an investment.



Current Balance (%)	Investment	Current Balance (\$)
84.96%	RBC COMMON STCK FUND	\$7,743.01
4.35%	ARTISAN MID CAP VAL	\$396.18
3.19%	FID MIP II CL 3	\$290.52
2.61%	TRP MID CAP GROWTH	\$238.12
2.52%	3RD AV SM CAP VAL IS	\$230.04
2.37%	AF EUROPAC GROWTH R6	\$216.01
100%	20 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2	\$9,113.88

Investments by Asset Class

		Shares		Change Per
	Balance	or Units †	NAV	Share or Unit (\$)
Stock Investments				
RBC COMMON STCK FUND	\$7,743.01	205.931	\$37.60	-\$0.38
3RD AV SM CAP VAL IS	\$230.04	10.409	\$22.10	-\$0.25
ARTISAN MID CAP VAL	\$396.18	17.951	\$22.07	-\$0.24
TRP MID CAP GROWTH	\$238.12	3.816	\$62.40	-\$0.90
AF EUROPAC GROWTH R6	\$216.01	5.067	\$42.63	-\$0.78
Bond/Managed Income				
FID MIP II CL 3	\$290.52	290 .520	\$1.00	\$0.00

Balances and prices are subject to nightly account updates.

†View your short term and long term shares.

Before investing in any mutual fund, please carefully consider the investment objectives, risks, charges and expenses. For this and other information, call or write Fidelity for a free prospectus.